



LENDER TRAINING REQUEST FORM

To ensure lender success offering WHEDA to its customers, WHEDA offers customized training

LENDER NAME: _____ CONTACT NAME: _____
 CONTACT PHONE: _____ CONTACT EMAIL: _____

Please specify which DELIVERY CHANNEL you have selected:

BROKER MINI CORRESPONDENT "MINI CORR" (FHA not allowed) CORRESPONDENT

Please specify which LOAN PRODUCTS you would like to offer your customers:

[WHEDA Advantage Conventional / Advantage First Time Home Buyer \(FTHB\) Conventional/ VALOR Conventional](#)

- Owner-occupied, Conventional loan, 30-year term, purchase product or WHEDA- to -WHEDA limited cash-out Refinance
- Income limits and Purchase Price limits apply
- Owner-occupied single family or 2-4 unit residence (2-4 unit must be a minimum of 5 years old)

[WHEDA FHA Advantage 203\(b\) \(CORRESPONDENT\) MUST HAVE DIRECT ENDORSEMENT DE# _____](#)

- Owner-occupied, FHA loan, 30-year term purchase product
- WHEDA Income limits and FHA Purchase Price limits apply
- Owner-occupied single family or 2-unit residence (2-unit must be a minimum of 5 years old)
- NOT APPLICABLE FOR MINI-CORRESPONDENT OR BROKER

[WHEDA Down Payment Assistance \(DPA\) Easy Close 2ND Mortgage](#)

- Owner-occupied, Conventional 10 year term purchase or limited cash-out refinance
- May only be used in tandem with a WHEDA-funded first mortgage – Rate is same as 1st mortgage rate

[WHEDA Mortgage Credit Certificate \(MCC\) MUST have completed and returned the MCC Participation Agreement](#)

- Exclusive WHEDA offering for FTHB - TAX CREDIT program that reduces the amount of federal income taxes paid by your borrowers.
- FTHB Income limits and Purchase Price limits apply
- Eligible borrowers can subtract up to 40% of their annual mortgage loan interest from Federal income tax dollars owed for up to 30 years

Please provide the following information to customize your training experience:

- What type of training would you prefer? WEBINAR IN PERSON
- What LOS system do you use? _____

Who will need training on WHEDA products? ALL STAFF SALES PROCESSING UW CLOSING

Who will need training on WHEDA MCC? ALL STAFF SALES PROCESSING UW CLOSING

Who will be locking loans? ALL STAFF SALES PROCESSING UW CLOSING

Who will need training on locking loans? ALL STAFF SALES PROCESSING UW CLOSING

Who will need training on WHEDACONNECT? ALL STAFF SALES PROCESSING UW CLOSING

- Who is the contact for Origination Questions?

NAME: _____ TITLE _____
 EMAIL: _____ PHONE: _____

- Who is the contact for Post-Closing Questions?

NAME: _____ TITLE _____
 EMAIL: _____ PHONE: _____

Who will be the WHEDA Delegated Administrator and set up all users in WHEDACONNECT?

NAME: _____ TITLE _____
 EMAIL: _____ PHONE: _____

Please submit this Training Request Form to SF.Sales@wheda.com.